Annual Review
Information Session

Beth Rodgers MacSween
Staff Development – 2017
Session Outcomes

• What Annual Review is and what it is not
• The benefits of Annual Review
• How to prepare for Annual Review
• The Annual Review forms
• The Annual Review discussion
• How to get the most out of Annual Review
What is Annual Review

- Reflect on achievements, challenges and progress made over the past 12 months
- Consider career aspirations
- Set objectives for the future and consider development needs
- Receive feedback and provide upward feedback
What Annual Review is not:

- A disciplinary interview in disguise
- An opportunity to raise grievances
- A direct discussion about salary or promotion
- A one-way process where the reviewer does all the talking
- An event that happens in isolation – there should be an ongoing process for reviewing outcomes
Why do we do Annual Review?

• To set objectives and ensure that work contributes to the achievement of both University and individual objectives
• To provide an opportunity for reflection on past achievements and challenges
• To help individuals identify and develop their potential
• To increase performance, morale and motivation
• To provide feedback to individuals and line managers
The Annual Review process: overview

1. Reviewer sets the date/venue for the discussion

2. Reviewee completes the Annual Review form and sends to reviewer 7 days before the discussion

3. Annual Review takes place

4. Reviewer provides comments following the discussion

5. Reviewer & reviewee agree objectives for future

6. Reviewer & reviewee agree development needs

7. Reviewer completes a form summarising the discussion and returns to reviewee

8. Closing the loop. Reviewee agrees the form and it is sent to the co-ordinator for the Annual Review exercise in your School/Section
Preparation for Review

• Agree interview arrangements (21 days notice)
• Review previous objectives and any other relevant documentation (consider job description, FAE)
• Review the previous year’s work
• Think about successes and learning points from the whole year to avoid focusing on the most recent events
• Look ahead to the coming year’s work
• Think about career development
• Reviewers - think about feedback you’d like to give and remember to be constructive
Preparation for Review

- Reviewee
  - Complete the form and return to reviewer 7 days ahead of the meeting
- Reviewer
  - If relevant, talk to other managers (with the knowledge of the reviewee)
  - Give a note of additional areas for discussion – no surprises
  - Meeting is on a one-to-one basis and confidential
Annual Review Form

• Personal Details
• Reflection
• Planning for Development
• Additional Points
• Upward Feedback
• Evaluation Form
The Annual Review Form: Grades 1 - 4

Pages 1 and 2 completed by the reviewee & submitted to reviewer 7 days ahead of the discussion

Page 3 completed by the reviewer within 7 days of the discussion
Annual Review

Personal Details

Name:
Job Title: [ ] Job Area: [ ]
Reviewer:

Reflection

Looking back over the last 12 months, what do you feel has gone well for you? Are there any particular achievements which you would like to highlight?

Again, looking back over the last 12 months, what do you feel hasn’t gone so well? Are there any difficulties which you can highlight?

Are there any additional points from the last 12 months that you would like to discuss?


### Planning for Development

Please detail any job objectives that you will be working towards in the future below:

<table>
<thead>
<tr>
<th>Objectives For The Next 12 Months</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

(E.g., estimated date of completion, progress so far, potential issues)
Why set objectives?

- To ensure achievement of the University’s Strategic Objectives
- To set and/or raise standards of work
- To enhance motivation
- To develop individuals and broaden skills
- To develop a new area of work
- To achieve project/research milestones
- To change priorities
- To implement a new policy
Setting Objectives

Objectives should be:

- A statement of what is required
- SMART (Specific, Measurable, Achievable, Relevant, Timely)
- Negotiated and agreed
- Stretching but achievable
- Give a sense of direction and purpose

The “Golden Thread”

- helps individual consider their role in the institution and how their role fits in as a whole.
Objectives - examples

- Supervise 6 or more undergraduate dissertations in the next academic year.
- Provide secretarial support for the ‘x’ conference from March to November 2014
- Present a synopsis of the course at the next quarterly full-team meeting
- Provide development support to a trainee administrator by mentoring for six months.
Appendix 2

Are there any skills you feel you need to develop in order to support your job role? If so please highlight these below:

<table>
<thead>
<tr>
<th>What is the skill you need to develop and how would you achieve this?</th>
<th>What are the benefits to you, your job area and the University?</th>
<th>When would you expect to achieve this?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Are there any additional points regarding development that you would like to discuss? This includes any career aspirations beyond your current grade.
Training and development

- Formal courses
- Conferences and seminars
- Induction
- On-the-job training and shadowing
- Coaching and mentoring
- Job exchange
- Attending meetings
- E-Learning
- Reading books and articles

University training providers:

Centre for Academic Development: www.abdn.ac.uk/cad
DIT Training & Development: www.abdn.ac.uk/tad
HR Staff Training & Development: www.abdn.ac.uk/hr/training/
University Mentoring Scheme

• “Offline help by one person to another in making significant transitions in knowledge, work or thinking”

• -Meggison and Clutterbuck (1999)
Mentoring Vs Coaching

Coaching
- Short term
- Current skills and performance
- Meetings are focused on resolving issues/goals
- Coach does not need to be an expert in the area of work
- Coach does not give advice

Mentoring
- Long term (12 months)
- More informal/ Less structured.
- Broader focus
- Focus on longer term career goals
- Directed by mentee
- Mentor has experience/skills in a relevant area
- Mentor can give advice
Benefits of Mentoring

Mentor Benefits:

• A sense of personal satisfaction
• An opportunity to share experience and expertise
• Gaining a different perspective on issues you are dealing with directly
• Gaining a different perspective on the institution as a whole
• Developing interpersonal and communication skills
• An opportunity to reflect on your own practice
• Increased self-awareness and awareness of your own learning gaps
• Developing leadership skills
• Gaining insight into staff morale etc.
• Developing the ability to challenge and stimulate
• Raising your profile within organisation
Benefits of Mentoring

Mentee Benefits:

- A source of support through a transition
- An opportunity to learn from a role model
- Help in clarifying, setting and achieving development goals
- A space for voicing concerns and anxieties in confidence.
- Support in problem solving/finding solutions to challenges
- Increased self-awareness and confidence
- Opportunity to receive honest and constructive feedback
- Increased network
- May open up other opportunities
- Developing learning, analytical and reflective skills
- Opportunity to explore new ideas and take risks
- Increased understanding of the way the University operates
Mentor as a coach
OSCAR Model

Outcome: Your destination
Situation: Your starting point
Choices & Consequences: Your route options
Actions: Your detailed plan
Review: Making sure you are on track
Please refer to the guidance notes for information on how to complete this section.
Page 5: Feedback – common mentions!

• I feel I could benefit from more regular catch up meetings with my line manager to discuss my work

• I require access to a particular computer programme in order to perform to the best of my ability in my role

• I am pleased with the support I have received from my line manager

• I would appreciate receiving minutes from department meetings which I am unable to attend
The Annual Review Form: Grades 5 – 9

Pages 1 - 5 completed by the reviewee & submitted to reviewer 7 days ahead of the discussion

Page 6 completed by the reviewer within 7 days of the discussion
Annual Review

Recommended For use by Staff in Grades 5 - 9

Personal Details

Name:

Job Title:  
Job Area:

Reviewer:

Date:

Section One: Reflection

Looking back over the last 12 months, what do you feel has gone well for you? Are there any particular achievements which you would like to highlight?

Again, looking back over the last 12 months, what do you feel hasn’t gone so well? Are there any difficulties which you can highlight?

Do you feel that your job has changed substantially in the past year? If so, please give examples.
Please outline the objectives set in your last review (if you have had one before) and your progress towards achieving these.

<table>
<thead>
<tr>
<th>Objective</th>
<th>Progress</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please briefly describe how your role has contributed towards the University’s activities.
# Section Two: Planning for Development

Do you have any specific career aspirations that you wish to discuss with your reviewer?

What do you hope to achieve? Please set objectives. Examples are provided in the guidance notes.

<table>
<thead>
<tr>
<th>What is the objective?</th>
<th>How will you measure it?</th>
<th>How will you achieve it?</th>
<th>Why is it relevant?</th>
<th>When would you expect to achieve this by?</th>
</tr>
</thead>
<tbody>
<tr>
<td>The objective should be a clear statement of what is expected.</td>
<td>It should be possible to measure and assess progress towards achieving the objective.</td>
<td>Objectives should acquire skills, experience and knowledge.</td>
<td>The objective adds value to your role and is relevant to the University’s Strategic Plan</td>
<td>An estimated timescale for the achievement of the objective.</td>
</tr>
<tr>
<td>Example: To provide supervisory support to a cleaner in order for them to expand their capabilities</td>
<td>Example: By having weekly catch-up meetings with the cleaner to update on progress</td>
<td>Example: By acting as a mentor and helping to pinpoint shadowing opportunities.</td>
<td>Example: Provides me with mentoring experience and allows the cleaner the opportunity to help the University deliver a high-quality student experience.</td>
<td>Example: Mentor the cleaner for 6 months from the date of the review meeting and review the effectiveness of the mentoring at this stage.</td>
</tr>
</tbody>
</table>
Are there any skills or competencies you feel you need to develop in order to achieve these objectives? Please outline any development needs for consideration here.

| What is the skill/competency you need to develop and how will you achieve this? Example: To learn how to use a piece of computer software, through shadowing a more experienced colleague | When would you expect to achieve this? Example: I would hope to achieve this within the next six months | What action will you take to ensure that the skill/competency is attained? Example: I will suggest a suitable colleague to shadow and submit my recommendation to my line manager | What are the estimated costs? Example: Around 8 hours of time away from my current role | What are the benefits to you, your job area and the University? Example: A lot of work in the department requires knowledge of the software so being able to use it would aid my personal development as well as help the department to run more effectively |

Are there any potential challenges which you may face in achieving these objectives, or any additional support you may require?
Review Comments

Reviewer Comments

Reviewer Signature:  Reviewer Signature:  Date:

Please take a copy of the form and return the completed form to the Coordinator for the Annual Review exercise in your School/Section.
Please ensure this is completed and return the evaluation form as the Annual Review process will be evaluated to ensure that appropriate modifications which are identified are implemented.
Giving Feedback

- What types of feedback have you used or received in the past?
  - What were the advantages of it?
  - What was not so good/could be improved?
Getting the most from an Annual Review

• Prepare thoroughly
• Adopt a positive approach
• Contribute to the discussion
• Take the lead when appropriate
• Don’t agree objectives which you feel are not achievable
• Make sure all your points are covered
• Aim for mutual agreement

• Agree 6 monthly follow-up session to review progress and whether objectives are still relevant
Annual Review Video of Good/Bad Practice

http://www.abdn.ac.uk/staffnet/working-here/appraisal-1602.php/
Sign-Posting

• Coaching

• Mentoring Coordinators

• HR Partners

• Development Services

• Occupational Health Services
Bethany Rodgers
MacSween
b.rodgers@abdn.ac.uk
Staff Development
@StaffDevUoA